

PENTEGRA Quick Facts

Retirement plan and fiduciary services for better plan outcomes

Pentegra is a fiduciary first.

Pentegra is one of America’s oldest, most experienced independent institutional fiduciaries. We were founded more than 80 years ago as a Named Plan fiduciary—long before the role formally existed under ERISA. Our heritage as an institutional fiduciary delivers a higher standard of care to drive successful retirement plan outcomes.



Our History

- An 80+ year legacy serving as an institutional fiduciary
- More than \$30 billion in assets under administration
- Serving over 55,000 retirement plans with more than one million participants
- Independent fiduciary expertise and oversight unmatched in the industry today
- One of the largest and most experienced Multiple Employer Plan (MEP) providers in the nation
- A board of directors comprised of our clients; we answer to those we serve



Fiduciary Legacy

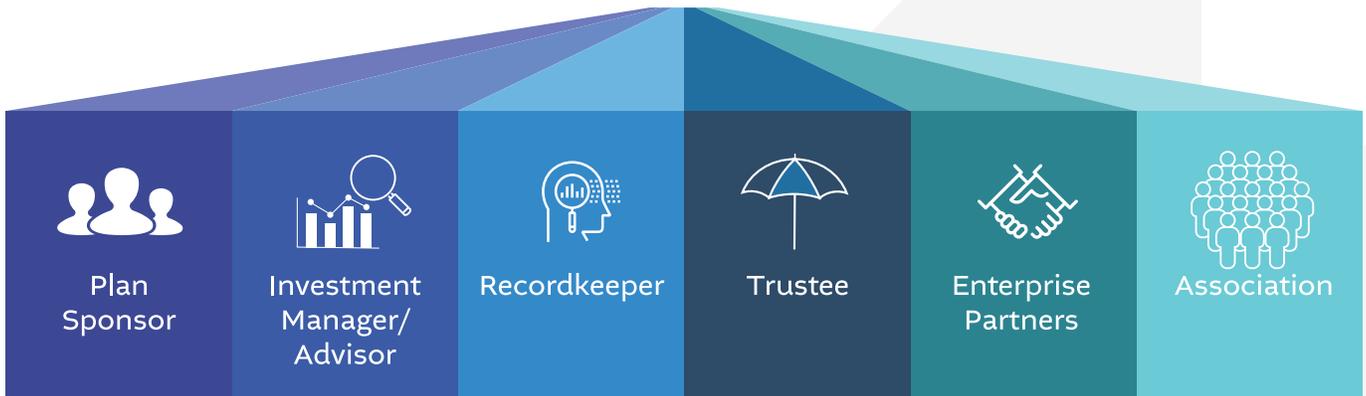
- As a fiduciary, we provide expert oversight and in-depth knowledge, shouldering much of the work and assuming legal responsibility for managing a retirement plan.
- We deliver compliance confidence. Clients have the assurance of knowing their plan is well designed, well managed, and compliant.
- Clients, advisors and professional partners enjoy a higher level of protection—and the peace of mind that having a professional on board delivers.

Flexible and Scalable Solutions for Every Opportunity			
RETIREMENT PLANS we manage	PLAN DESIGNS we support	FIDUCIARY ROLES we perform	SERVICES we offer
<p>Defined Benefit Plans, including traditional Pension Plans, Cash Balance Plans and Other Hybrid arrangements</p> <p>Defined Contribution Plans, including 401(k), 403(b) and Profit Sharing Plans</p>	<p>Single Employer Plans</p> <p>Multiple Employer Plans (MEPs)</p> <p>Pooled Employer Plans (PEPs)</p> <p>Association Retirement Plans (ARPs)</p>	<p>Named Fiduciary</p> <p>3(16) Fiduciary Administrator</p> <p>3(38) Investment Fiduciary</p>	<p>Third Party Administrator (TPA) Services</p> <p>Plan Design Consulting</p> <p>Plan Correction Consulting</p> <p>Regulatory & Technical Consulting</p> <p>Plan Benchmarking & Competitive Positioning</p> <p>Actuarial Consulting</p> <p>Institutional Investment Consulting</p>

Your Partner in Success

We work in partnership with plan sponsors and trusted advisors, or at the enterprise level, with recordkeepers, trustees and investment management firms, who have already formed a relationship with the plan. In fact, we work with nearly every major recordkeeper and trustee in the industry today. Our services can be added on, seamlessly.

Our Relationships



Expertise You Can Depend On

Our reputation for excellence attracts top industry professionals. With more than 300 associates, the average tenure of our client-facing team members is 15+ years, and more than 60% hold advanced degrees and/or professional credentials. You'll work with a dedicated team of knowledgeable and seasoned professionals who develop a deep understanding of every client's plan and help you stay up-to-date in this complex and highly regulated industry.



CEFEX Certified

Pentegra is one of an elite group of CEFEX certified Third Party Administrators, demonstrating a standard of excellence, industry best practices and elevated governance and oversight.



Visit us at www.pentegra.com or contact the Pentegra Solutions Center at solutions@pentegra.com or 855-549-6689.

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